Contacts

PinPoint allows you to keep track of your accounts/contacts, whether that's vendors, clients, prospects, etc., through the built-in Contact Manager.

Go to Contact Management > Contacts within the PinPoint menu on the left side of the page.

Add Contact

1. Click the Add Contact
2. Enter the Display Name for the contact.
3. Enter the First Name and Last Name.
4. Fill in any other information you would like to have for the contact, then click the Save button when finished.

Import Contacts

1. Click the Import Contacts
2. Choose the file you want to import.
3. Click Import Contacts.

Manage Contacts

The Fx button next to each account will have the following options:

1. Opportunities – Manage contact opportunities.
2. Reminders – Manage contact reminders.
3. Appointments – Manage contact appointments.
4. Email – Send an email to the contact.
5. Notes – View contact notes.
6. Labels – Customize the field labels for the contact.
7. Timer – Timers will allow you to enter start and end times for an appointment. This may be particularly helpful for those needing to submit to insurance companies for payment. This can also be helpful for your own information to keep track of contact made to each contact.
8. Display – This function allows you to view Contact Notes, Appointments, Emails, Opportunities, and Reminders.
9. Documents – View the documents assigned to the contact.
10. Delete – Delete the contact.

Edit Contact

To edit a Contact, click the contact you want to open under the Display column.

When finished making your changes, be sure to click the Save button.